

Auto Attendant User Guide



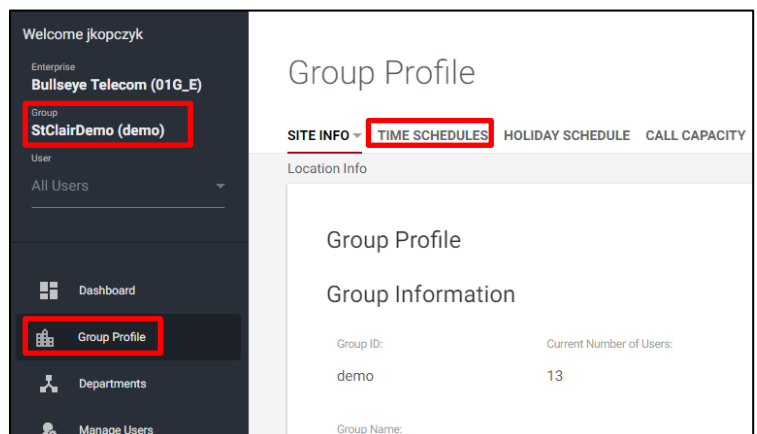
This user guide is everything you need to be able to correctly setup your Auto Attendant. This involves setting your time schedules, configuring your Auto Attendant, recording and submitting your greetings, and determining your call routing. The VoIP Portal provides easy access to configure and manage your Auto Attendant.

Note: For information regarding accessing and navigating the VoIP Portal, please refer to *Managing Your Hosted PBX Services*.

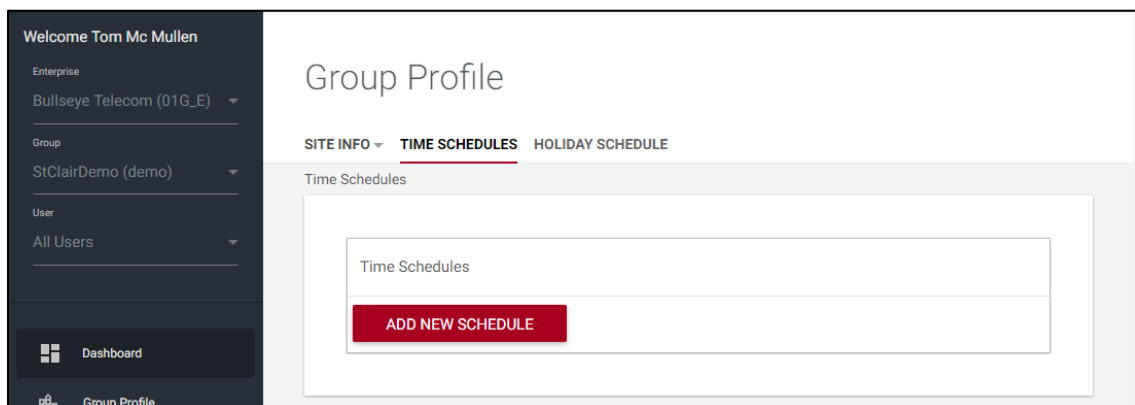
Setting Your Time Schedule

Note: Time Schedule is optional and only needed if you wish to have an After Hours menu and greeting that is separate & different from the Business Hours menu and greeting. If you only require a business hours greeting, proceed to *Setting Up Your Auto Attendant* on page 4.

1. Select the **Group** for which the Time Schedule/Auto Attendant applies.
2. From the **Group Profile** menu, select **Time Schedules**.



The Time Schedules page is displayed.



3. Click **Add New Schedule** to create a time schedule. The Name dialog box is displayed.
4. Enter a name for your schedule then click **OK**.

Auto Attendant User Guide



5. Hover over the starting time for the first day of your schedule, then click and drag to the right to the end time. When you release the mouse, the block of time will be applied to the selected day.

NOTE: Any hours or days of the week not defined here will be treated by the After Hours greeting and routing options.

6. To edit a block of time, click on the time range, adjust the **Start** and **End time** as needed and then click **Submit**.
7. To delete a block of time, right-click on the time range and click the Delete event checkbox.

8. To rename a schedule, click **Rename**, then repeat step 4.
9. To delete a schedule, click **Delete**, then click **Yes**.
10. To save any changes to the schedule, click **Save**.

Setting Your Holiday Schedule

Note: Holiday Schedule is optional and only needed if you wish to have an alternate greeting and options for your auto attendant for specific holidays. If you only require a business hours greeting, proceed to *Setting Up Your Auto Attendant* on page 4.

1. From the **Group Profile** menu, select **Holiday Schedule**.

The Holiday Schedule page is displayed.

2. Click **Add Holiday Schedule**.

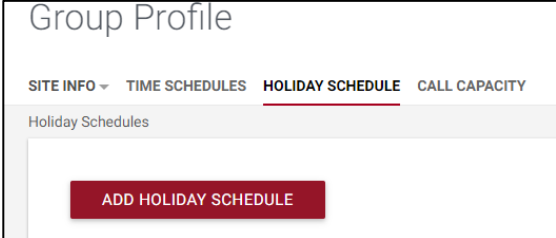
The Add Holiday Schedule dialog box is displayed.

3. Enter the **Holiday Schedule Name**.

4. For each holiday to be included in the Holiday Schedule:

- Enter a **Holiday** name.
- Select a **Date Start** and **Date End**.
- If desired, select a **Recurrence**.
 - Select **Indefinite** or **Limited**. If **Limited** is selected, enter a **To Date** to indicate when the Recurrence will end.

5. When finished, click **Save**.

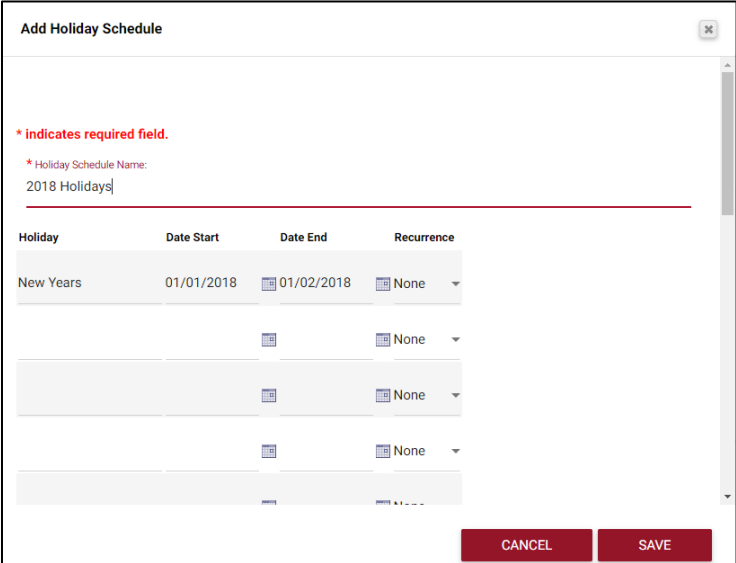


Group Profile

SITE INFO ▾ TIME SCHEDULES **HOLIDAY SCHEDULE** CALL CAPACITY

Holiday Schedules

ADD HOLIDAY SCHEDULE



Add Holiday Schedule

* indicates required field.

* Holiday Schedule Name:
2018 Holidays

Holiday	Date Start	Date End	Recurrence
New Years	01/01/2018	01/02/2018	None ▾
			None ▾
			None ▾
			None ▾
			None ▾

CANCEL **SAVE**

Auto Attendant User Guide



Setting Up Your Auto Attendant

Setting up your Auto Attendant consists of 3 primary steps:

1. Configure your Auto Attendant, including:
 - If applicable, assign the schedules you created
 - Establish where incoming calls are routed
2. Record custom greetings
3. Assign the custom greeting to the Auto Attendant

Step 1: Configure Your Auto Attendant

To do this, follow the steps on the next few pages.

1. Select the Group for which the Auto Attendant is to be assigned.
2. Select the **Group Services** menu.
3. Select Auto Attendant from the Site Services menu.
4. Select the desired Auto Attendant from the drop-down field.

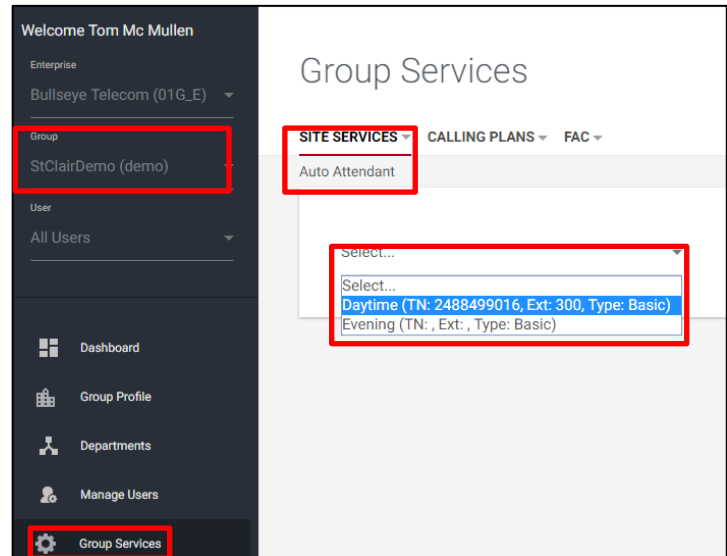
The Auto Attendant Profile page is displayed.

5. Review the following information.
 - a) **Auto Attendant ID:** This is a unique identifier for the Auto Attendant. Usually the same as the Phone Number to which the Auto Attendant is assigned.
 - b) **Name:** Name of the Auto Attendant.
 - c) **Calling Line ID First & Last Name:** This is the Caller ID name for the Auto Att.
 - d) **Time Zone.** Should be set to your location's Time Zone.
 - e) **Business Hours.** If you created a Time Schedule, select the Business Hours Schedule from the drop down.
 - f) **Holiday Schedule.** If you created a Holiday Schedule, select the Holiday Schedule from the drop down.
 - g) **Scope of dialing.** Set these two options to the Group level.
 - h) **Name Dialing Entries.** Choose your preference.



Some Things to Know!

- Changes to the Auto Attendant configuration can *only be made* at the Group Level.
- The Auto Attendant can be accessed from *any* PC, and the updates that are made occur instantly – no waiting!



The screenshot shows the 'Auto Attendant Profile' configuration page. At the top is a 'SAVE' button. Below it is a red asterisk indicating required fields. The 'Profile' section includes fields for 'Auto Attendant ID' (Daytime), 'Phone Number' (2488499016), 'Extension' (300), 'Type' (Basic), and 'Name' (Sales & Service). The 'Calling Line ID' section includes fields for 'Last Name' (Company), 'First Name' (ABC), 'Department' (None), 'Language' (English), 'Time Zone' ((GMT-05:00) (US) Eastern Time), 'Business Hours' (Every Day All Day), and 'Holiday Schedule' (None). At the bottom, there are radio buttons for 'Scope of Extension Dialing' (Enterprise, Group, Department) and 'Scope of Name Dialing' (Enterprise, Group, Department). The 'Name Dialing Entries' section has radio buttons for 'Last Name + First Name' (selected) and 'Last Name + First Name and First Name + Last Name'. At the very bottom are tabs for 'Business Hours' and 'After Hours'.

Auto Attendant User Guide



6. Under **Business Hours Greeting** click the **Default Greeting** radio button. Later we will share the various options of installing a customized personal greeting.
7. Under the Business Hours Dialing Menu, configure the prompts for how the Auto Attendant will route incoming calls during normal business hours.
 - a. Up to 12 handset keys (0 - #) can be assigned to the Auto Attendant. Enter the following as desired:
 - **Description:** Enter a descriptive name of the prompt so that you can identify it from the others.
 - **Action:** Select from the drop-down the particular action that will be invoked when a caller selects that particular key. There are 7 choices (see the following page for details):
 - **Phone:** For any of the “transfer” options that were selected, a corresponding phone number to where that call is directed needs to be entered.
8. To set up the **After Hours** greeting and Dialing Menu options, click the **After Hours** tab and repeat steps 5 & 6. The After Hours greeting and menu options will automatically apply whenever the Auto Attendant is invoked outside of the assigned Business Hours schedule.
9. When finished, click **Save**.

NOTE: If this information already appears to be completed, move ahead to the next step.

Business HoursAfter Hours

Business Hours Greeting

☐ Default Greeting

☒ Personal Greeting test recording -AP CHANGE NAME.wav (Group) ▼

Business Hours Dialing Menu

☐ Enable first-level extension dialing

KEY	DESCRIPTION	ACTION	PHONE
0	group operator	Transfer To Operator	▼211
1	Sales	Transfer With Prompt	▼200
2	Service	Transfer Without Prompt	▼250
3	Dial by Name	Name Dialing	▼
4	Dial by Extension	Extension Dialing	▼
5	Repeat	Repeat Menu	▼
6		---	▼
7		---	▼
8		---	▼
9		---	▼
*		---	▼
#		---	▼

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls:

☒ No Privacy

☐ Privacy For External Calls

☐ Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls:

☒ Never

☐ Internal Calls

☐ All Calls

Calling Line Identity for Redirected Calls:

☒ Originating Identity

☐ Redirecting User Identity For External Redirections

☐ Redirecting User Identity For All Redirections

SAVE

Auto Attendant User Guide



Action	Prompt played to caller	What happens
Transfer to operator	"Please wait while your call is transferred to the operator."	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Transfer with prompt	"Please wait while your call is transferred."	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Transfer without prompt	None	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Name dialing	None	Access to name dialing.
Extension dialing	None	Access to extension dialing.
End call	"Thank you for calling."	Call is released.
Repeat menu	None	Menu greeting is replayed.
--- (Indicates no action has been selected.)	Not applicable	Menu greeting is replayed.

For example, greetings and corresponding information could be setup as follows:

- **Press 0** or wait on the line to reach the Operator (select the Action: Transfer to operator and enter the full phone number or extension of the person designated as the operator in the Number field.).
- **Press 1** to dial by extension (no information is needed for callers to have this option).
- **Press 2** to dial by name (no information is needed for callers to have this option).
- **Press 3** to reach the Marketing department (select the Action Transfer with/without prompt, enter "Marketing" in the Description column and the phone number or extension of the marketing representative in the Number column).
- **Press 4** to reach the Customer Service department (select the Action: Transfer with/without prompt, enter "Customer Service" in the Description column and the phone number of the customer service representative in the Number column).



Some Things to Know!

- Any phone number can be entered into the system – it does not have to necessarily be an office phone number. It can be a cell number, a home number, or even reference the extension of another service such as a Hunt Group.



Some Things to Know!

- You can multiple Auto Attendants as well as nest one Auto Attendant within another. For example, your Main Auto Attendant could reference the extension of another Auto Attendant such as Customer Service or Sales which can have a different greeting and options.
- To order another auto attendant, please contact your BullsEye Account Manager, Sales Representative or Client Services.

Step 2: Recording Your Custom Greeting

There are two primary ways to record and assign greetings to your Auto Attendant:

- From a phone within the group: *See below.*
- From the Announcement Repository. Once recorded, greetings are uploaded to the Announcement Repository so that they can be selected and assigned to the Auto Attendant as well as other services within the VoIP Portal. For more information on recording greetings and uploading the greetings to the Announcement Repository, please refer to the *Announcement Repository Quick Guide*.

When using a time schedule and both the Business Hours menu and After Hours menu in the Auto Attendant, consider recording separate greetings for Business Hours versus After Hours:

Business Hours Greeting	"Thank you for calling ABC Company. If you know your party's extension, please dial it now. For Sales, dial 1. For Service, dial 2. For hours and location, dial 3. To reach the operator, press 0 now. To repeat this menu, press star."
After Hours Greeting	"Thank you for calling ABC Company. We are currently closed. If this is an emergency, press 1 and you will be routed to our 24 hour call center."

From a phone within the group

1. Enter the **extension** (mailbox ID) of the Voice Portal (for example: 999) and then press #
2. Enter the Voice Portal mailbox ID and then press #
3. Enter the Voice Portal **passcode** and then press #
4. Press **1** to access the greeting function.
5. Press **1** to create your **Business Hours Greeting**.
6. Press **1** to record. State out loud the message that will be heard when you are on the phone. Press # when done.
7. Press **2** to listen to your recorded message. Press **1** to re-record.
8. When finished, press * to return to the previous menu.
9. Press **2** to create your **After Hours Greeting**.
10. Press **1** to record. State out loud the message that will be heard when you are not able to answer the phone. Press # when done.
11. Press **2** to listen to your recorded message. Press **1** to re-record.
12. When finished, press * to return to the previous menu.

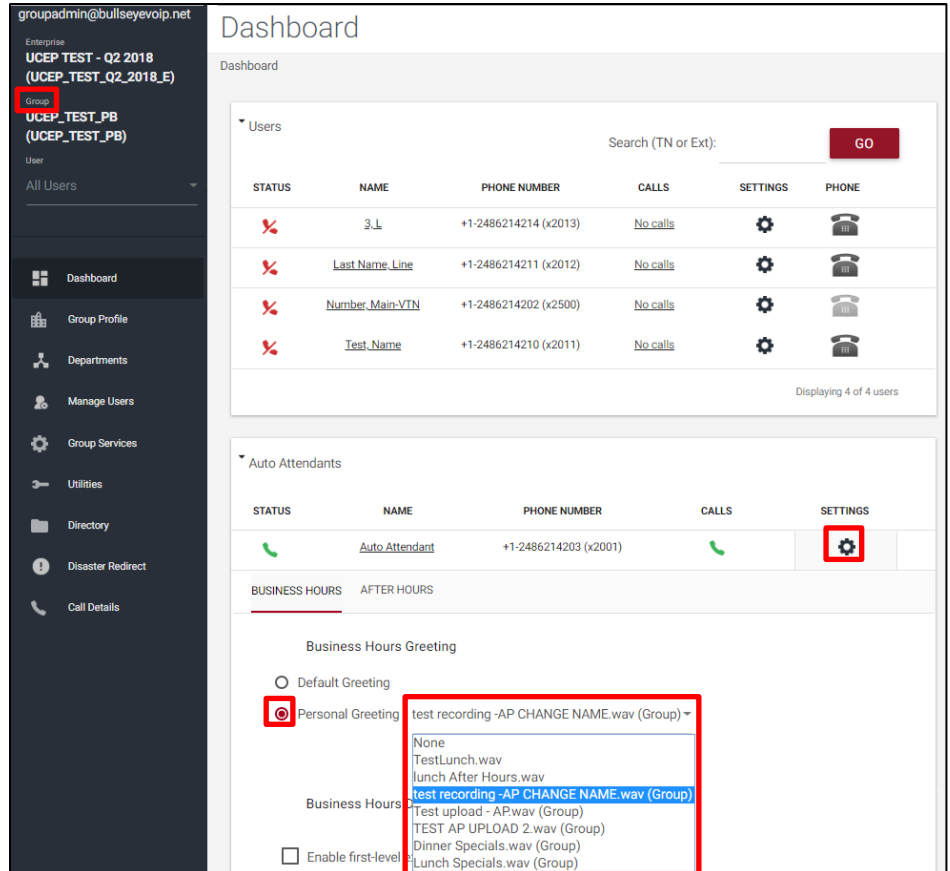
The greeting will be assigned to the corresponding Auto Attendant. It will also be loaded into the Announcement Repository at the Auto Attendant level of the VoIP Portal. For more information on accessing your greetings in the Announcement Repository, please refer to the *Announcement Repository Quick Guide*.

Step 3: Assigning a Custom Greeting to the Auto Attendant

Now that the Business Hours and After Hours greetings have been recorded, complete the procedure by assigning them into the Auto Attendant.

1. From the Group Dashboard scroll down to the **Auto Attendants** section.
2. Click the **Settings** icon to expand the desired Auto Attendant settings.
3. Under the **Business Hours Greeting** section, select the **Personal Greeting** radio button.
4. Select the greeting you would like to apply from the Personal Greeting drop down.
5. When finished, click **Save** at the bottom of the Auto Attendant section.

Repeat this process for the **After Hours Menu** or any other Auto Attendants you may have.



The screenshot shows the Bullseye Group Dashboard. On the left is a sidebar with navigation links: Dashboard, Group Profile, Departments, Manage Users, Group Services, Utilities, Directory, Disaster Redirect, and Call Details. The main content area is titled 'Dashboard' and contains two sections: 'Users' and 'Auto Attendants'.

The 'Users' section displays a table with columns: STATUS, NAME, PHONE NUMBER, CALLS, SETTINGS, and PHONE. It shows four users, all with a status of 'No calls' and a 'No calls' message in the CALLS column. The 'SETTINGS' column has a gear icon for each user.

The 'Auto Attendants' section displays a table with columns: STATUS, NAME, PHONE NUMBER, CALLS, and SETTINGS. It shows one auto attendant named 'Auto Attendant' with a status of 'No calls' and a 'No calls' message in the CALLS column. The 'SETTINGS' column has a gear icon.

Below the 'Auto Attendants' table, there is a section for 'Business Hours Greeting'. It has two radio buttons: 'Default Greeting' and 'Personal Greeting'. The 'Personal Greeting' radio button is selected. Below the radio buttons is a dropdown menu showing a list of greetings. The selected greeting is 'test recording -AP CHANGE NAME.wav (Group)'. Other greetings in the list include 'None', 'TestLunch.wav', 'Lunch After Hours.wav', 'Test recording -AP CHANGE NAME.wav (Group)', 'Test upload - AP.wav (Group)', 'TEST AP UPLOAD 2.wav (Group)', 'Dinner Specials.wav (Group)', and 'Lunch Specials.wav (Group)'.

Auto Attendant Menu Options

Group Voice Portal Main Menu

Press 1 for “Change Auto Attendant Greetings” (If you have more than one Auto Attendant, you are prompted to enter the extension of the auto attendant to change, followed by the pound key.)

Press 2 for “Change Voice Portal Branding”

Press 9 for “Exit Voice Portal”

Press # for “Repeat Main Menu”

Auto Attendant Greetings

Press 1 for “Change the Business Hours Greeting”

Press 2 for “Change the After Hours Greeting”

*Press ** for “Return to Voice Portal main menu”

Press # for “Repeat menu”

Business Hours Greeting

Press 1 for “Record new Business Hours Greeting”

Press 2 for “Listen to current Business Hours Greeting”

Press 3 for “Revert to default Business Hours Greeting”

*Press ** for “Return to Auto Attendant Greetings main menu”

Press # for “Repeat menu”

After Hours Greeting

Press 1 for “Record new After Hours Greeting”

Press 2 for “Listen to current After Hours Greeting”

Press 3 for “Revert to default After Hours Greeting”

*Press ** for “Return to Auto Attendant Greetings main menu”

Press # for “Repeat menu”

Voice Portal Branding

Press 1 for “Voice Portal Greeting”

Press 2 for “Voice Messaging Greeting”

*Press ** for “Return to Voice Portal main menu# Repeat menu”

Voice Portal Greeting

Press 1 for “Record new Voice Portal Greeting”

Press 2 for “Listen to current Voice Portal Greeting”

Press 3 for “Revert to default Voice Portal Greeting”

*Press ** for “Return to Voice Portal Branding main menu”

Press # for “Repeat menu”

Voice Messaging Greeting

Press 1 for “Record new Voice Messaging Greeting”

Press 2 for “Listen to current Voice Messaging Greeting”

Press 3 for “Revert to default Voice Messaging Greeting”

*Press ** for “Return to Voice Portal Branding main menu”

Press # for “Repeat menu”